

July 27, 2009

TO: Electra Jubon, Senior Field Representative
Washington Federation of State Employees (WFSE)

FROM: Teresa Parsons, SPHR
Director's Review Program Supervisor

SUBJECT: Mary Anne Turlington v. Eastern Washington University (EWU)
Allocation Review Request ALLO-08-092

On May 28, 2009, I conducted a Director's review telephone conference regarding the allocation of Mary Anne Turlington's position. Present at the Director's review conference were you and Ms. Turlington; Lori Kory, Human Resources Associate, representing EWU; and Ms. Turlington's supervisor, Greg Crary.

Director's Determination

This position review was based on the work performed for the six-month period prior to September 2, 2008, the date Ms. Turlington submitted a Position Questionnaire (PQ) requesting reallocation. As the Director's designee, I carefully considered all of the documentation in the file, the exhibits presented during the Director's review conference, and the verbal comments provided by both parties. Based on my review and analysis of Ms. Turlington's assigned duties and responsibilities, I conclude her position should be reallocated to the Information Technology 2 (ITS 2) classification.

Background

On September 2, 2008, Ms. Turlington completed a PQ, requesting that her Information Technology Specialist 1 (ITS 1) position be reallocated to the ITS 2 classification (Exhibit C-1). On November 3, 2008, Ms. Kory issued her Audit Results, concluding Ms. Turlington's position was properly allocated as an ITS 1. In her review, Ms. Kory met with Ms. Turlington and her supervisor, Mr. Crary. In her allocation decision, Mr. Kory referenced Ms. Turlington's notation on the PQ that she had been performing higher-level IT 2 duties for "10 months or more." Ms. Kory indicated this was partially confirmed by a prior job audit results notification in January 2008. Ms. Kory indicated the previous job audit showed Ms. Turlington performing ITS 2 duties 40% of the time and fiscal duties 60% of the time (Exhibit C-2).

However, the January 2008 Audit Results were rescinded after the Chief Information Officer, Gary Pratt, approved Ms. Turlington's request to withdraw the audit. Ms. Turlington indicated she withdrew the audit request the same day she handed it in to the Human Resources Office (Exhibit B-1). EWU does not dispute Ms. Turlington had been assigned ITS 2 level duties. However, EWU asserts Ms. Turlington did not assume the "greater portion of technical duties" until August 13, 2008 (Exhibit C-2). As a result, Ms. Kory determined Ms. Turlington's position should remain allocated as an ITS 1. Ms. Kory concluded Ms. Turlington had not been performing the higher-level ITS 2 duties a majority of the time for the six-month period prior to requesting her position review.

On November 24, 2008, the Department of Personnel received Ms. Turlington's request for a Director's review of EWU's allocation decision.

Summary of Ms. Turlington's Perspective

Ms. Turlington contends the majority of her work time was spent performing higher-level ITS 2 duties prior to and during the six-month period before she requested a position review. Ms. Turlington highlights the relevant six-month period as March 2, 2008 through September 2, 2008. Ms. Turlington asserts the previous audit review referenced by EWU was prior to the timeframe relevant for this review. Ms. Turlington further asserts she withdrew that request and that no formal decision was issued because the audit was rescinded. Ms. Turlington acknowledges she performed some fiscal activities related to the billing of telecommunications vendors, such as Verizon. However, Ms. Turlington contends that her former supervisor, Tom Akin, had divided the fiscal duties between her position and two of her co-workers in ITS 2 positions in early February 2008. Ms. Turlington maintains that the majority of her work during the six-month period prior to her request was performed at the ITS 2 level.

Summary of EWU's Reasoning

EWU acknowledges Ms. Turlington's duties related to servicing the help desk reach the ITS 2 level. EWU also acknowledges that by August 2008, the majority of Ms. Turlington's assigned work fit within the ITS 2 classification. However, EWU contends that Ms. Turlington continued to process financial transactions for telecommunications vendors until August 13, 2008. In August 2008, EWU states that the fiscal duties were reassigned to a newly hired position. EWU contends Ms. Turlington had not been performing ITS 2 level duties the majority of the time for at least six months prior to her request for a position review. Therefore, EWU asserts Ms. Turlington's position remained properly allocated to the ITS 1 classification.

Rationale for Director's Determination

The purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is

performed. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the class that best describes the overall duties and responsibilities of the position. Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

Ms. Turlington is assigned to the Office of Information Technology, Customer Support Systems. During most of the review period, Ms. Turlington reported to the Telecommunications Manager (ITS 5), Tom Akin. In mid-July 2008, Mr. Akin left his position. In August 2008, Greg Crary, Director of Customer Support Systems, became her supervisor. An organizational chart shows the structure of the office after Mr. Crary became Ms. Turlington's supervisor (Exhibit C-3).

On the PQ, Ms. Turlington describes the majority of her work (65%) as technical support (Exhibit C-1). In summary, this includes capturing customer issues while working at the service desk (help desk). For example, Ms. Turlington indicates that her work includes processing trouble tickets, managing directory updates, resolving problems regarding Cisco IP phones, and supporting telephone devices. Ms. Turlington also troubleshoots equipment and printers and contacts vendors frequently to work on resolving problems. Further, Ms. Turlington indicates that 20% of her time involves consulting with customers on cell phone needs; 10% performing system administration; and 10% processing Verizon Wireless cell phone invoices for payment. It is undisputed that the Information Technology work assigned to Ms. Turlington's position meets the ITS 2 level.

The issue in dispute is whether or not the ITS 2 level duties assigned to Ms. Turlington's position comprised the majority of her work, and whether she performed those duties for at least six months. Ms. Turlington asserts she had been performing higher-level ITS 2 duties for at least ten months at the time she requested a position review. Because Mr. Akin had been her supervisor for most of the time period relevant to this review, I reviewed the job description and performance expectations he completed on July 7, 2008 (Exhibit C-13). I reviewed this information to gain a greater understanding of the scope of work assigned to Ms. Turlington's position. Mr. Akin described the primary purpose of Ms. Turlington's position as follows:

Under general supervision, this position is responsible for assisting in the delivery of information technology support services to the university community. This position will address customer care activities related to Information Technology's Service/Help Desk and Telephone Operator functions.

I realize the position description created by Mr. Akin was part of the performance development process, and I weighed this documentation along with the other documents in the record, as well as the comments from the parties.

In EWU's allocation decision, there is a notation explaining Mr. Crary's breakdown of Ms. Turlington's duties. He indicates that 30% of her time was devoted to fiscal activities (processing the Verizon billing). Mr. Crary indicated that this shift of duties occurred on

August 13, 2008 (Exhibit C-2, page 2 and Exhibit C-7). However, Ms. Turlington states that Mr. Akin divided the fiscal duties among ITS 2 staff on February 5, 2008, as indicated by her handwritten notation on her copy of Mr. Akin's breakdown of duties (Exhibit C-11). EWU asserts Mr. Akin did not divide the fiscal duties until June 5, 2008 (Exhibit C-7). During the Director's review conference, Ms. Turlington indicated that she recalled receiving an email in early February 2008, around the time Mr. Akin split the fiscal responsibilities. Ms. Turlington stated that she requested a copy of Mr. Akin's email from EWU but that his email account no longer existed (Exhibit C-7-c).

I have considered the discrepancies about Ms. Turlington's assignment of fiscal duties, which affected the amount of time spent performing ITS 2 duties. The documents in the record describing Ms. Turlington's assignment of work are the PQ she completed, Mr. Crary's comments, and the Position Description Mr. Akin completed. While there is a reference to a January 10, 2009 audit, the audit was rescinded and does not exist in the record. Further, there is no Position Description for an earlier time period that documents the breakdown of time allotted to ITS 2 duties and fiscal duties. Mr. Crary did not become Ms. Turlington's supervisor until August 2008. Because there is no question the IT duties assigned to Ms. Turlington's position fit within the ITS 2 classification, allocation to the ITS 1 class is not the appropriate fit. While the billing tasks are a component of Ms. Turlington's duties and responsibilities, the overall scope of her position involves IT work and fits within the IT Class Series Concept, which states, in part, that positions "perform professional information technology systems and/or applications support for . . . telecommunications software or hardware" (Exhibit C-4-a). Therefore, allocation to the Fiscal Technician classes is not the best fit. Similarly, while Ms. Turlington does fill in for the campus operator, the primary purpose of her position is to provide information technology support services through activities related to the service or help desk. Therefore, the Telephone Communications Operator is not the best fit.

In Salsberry v. Washington State Parks and Recreation Commission, PRB Case No. R-ALLO-06-013 (2007), the Personnel Resources Board addressed the concept of best fit. The Board referenced Allegrì v. Washington State University, PAB Case No. ALLO-96-0026 (1998), in which the Personnel Appeals Board noted that while the appellant's duties and responsibilities did not encompass the full breadth of the duties and responsibilities described by the classification to which his position was allocated, on a best fit basis, the classification best described the level, scope and diversity of the overall duties and responsibilities of his position.

The Information Technology Specialist 2 definition reads as follows:

In support of information systems and users, performs standard consulting, analyzing, programming, maintenance, installation and/or technical support.

Under general supervision, follows established work methods and procedures to complete tasks on computers and/or telecommunication software/hardware, applications, support products, projects, or databases for small scale systems or programs or pieces of larger systems or programs.

Performs standard tasks such as consulting with customers to identify and analyze technology needs and problems; responding to and resolving trouble reports from users; processing equipment and service orders; coordinating installations, moves, and changes; analyzing problems for parts of applications and solving problems with some assistance; supporting and enhancing existing applications in compliance with specifications and standards; conducting unit, system or usability testing; writing specifications and developing reports; developing and conducting application, software and/or system operation training for users; or serving as part of a problem solving team addressing more complex issues. The majority of tasks are limited in scope and impact individuals or small groups. Complex problems are referred to a higher level.

Although examples of typical work identified in a class specification do not form the basis for an allocation, they lend support to the work envisioned within a classification. Providing help desk technical support, responding to trouble reports from users, and identifying and resolving problems within an incumbent's control are examples of typical work consistent with the work assigned to Ms. Turlington's position.

When considering the preponderance of evidence in conjunction with the level, scope and diversity of the overall duties and responsibilities of Ms. Turlington's position, the ITS 2 classification is the best fit.

Appeal Rights

RCW 41.06.170 governs the right to appeal. RCW 41.06.170(4) provides, in relevant part, the following:

An employee incumbent in a position at the time of its allocation or reallocation, or the agency utilizing the position, may appeal the allocation or reallocation to . . . the Washington personnel resources board Notice of such appeal must be filed in writing within thirty days of the action from which appeal is taken.

The mailing address for the Personnel Resources Board (PRB) is P.O. Box 40911, Olympia, Washington, 98504-0911. The PRB Office is located at 600 South Franklin, Olympia, Washington. The main telephone number is (360) 664-0388, and the fax number is (360) 753-0139.

If no further action is taken, the Director's determination becomes final.

c: Mary Anne Turlington
Lori Kory, EWU

Enclosure: List of Exhibits

MARY ANNE TURLINGTON v. EWU

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List of Exhibits

A. Filed by Employee November 24, 2008:

1. Director's Review request
2. EWU allocation determination letter, November 3, 2008.

B. Dept. of Personnel's Acknowledgement letter sent in by Mary Anne Turlington January 20, 2009

1. Letter from Mary Turlington dated January 7, 2009 her defense response to HR's Allocation decision letter (Response to Timeframe Considerations: Each paragraph is numbered 1,2,3 with the pages attached that corresponds with the number).

C. Cover letter dated January 26, 2009 from HR with the employer exhibits and the Employee Exhibits:

Employer Exhibits

1. Position Questionnaire dated 9/2/08 & signed by Ms. Turlington (constitutes her original position review request and position description)
2. Allocation determination letter dated 11/03/2008
3. Organizational chart for Customer Support Systems, Office of Information Technology.
4. Classification specs used for allocation determination:
 - a. Information Technology Specialist 1
 - b. Information Technology Specialist 2
 - c. Fiscal Technician 2
 - d. Telephone Communication Operator
5. Management and Personnel Officer Statement, signed by Ms. Turlington's supervisor, Greg Crary, on 10/6/2008
6. Notes taken during interview with Ms. Turlington on 10/7/2008
7. Email communications and attachments:
 - a. From Mr. Thomas Akin (Ms. Turlington's former supervisor) dated 6/5/2008, including attachment "Invoice Assignments"
 - b. From Mr. Greg Crary (Ms. Turlington's current supervisor) dated 10/8/2008
 - c. Ms. Turlington's comments regarding Mr. Akin email correspondence

Employee Exhibits

8. Cover letter from Ms. Turlington dated 1/7/2009.
9. Copy of Allocation determination letter dated 11/3/2008 (same as B-1) with added notations by Ms. Turlington to indicate numbering.
10. Copy of Position Questionnaire signed by Ms. Turlington and dated 9/2/2008
11. Document labeled "Invoice Assignments" with handwritten notation of 2/5/08.
12. Memo from Ms. Turlington to Greg Crary with handwritten date: 11-06-08
13. Job description dated 7/8/2008 and Performance Expectations from Tom Akin

D. June 20, 2009 email from Teresa Parsons to the parties regarding additional documents mentioned during the Director's review conference.

E. June 19, 2009 email from Electra Jubon with attached Position Descriptions for ITS 2 positions in Office of Information Technology (Demonstrative only)